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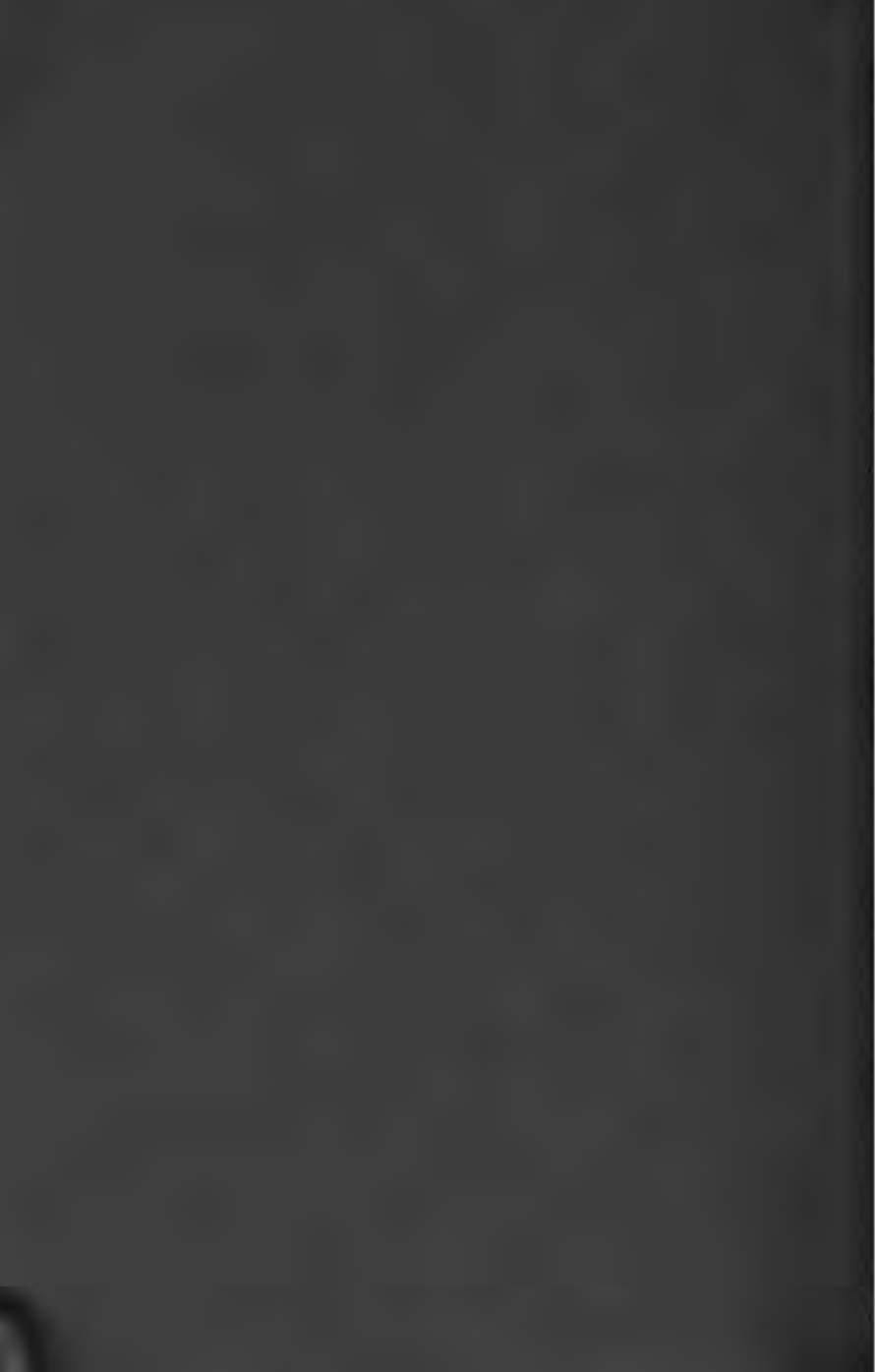
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## *Applied* INDEXING

**T**HE FILING DEPARTMENT of a business is often called its *Intelligence Department*.

Have you an intelligence department in your business? Are the original records of your transactions ordered in such a way that you can at any moment trace a transaction to its source, place responsibility for every action or use of judgment, whether it happened yesterday or a year ago? That is what the proper filing method in your business should enable you to do.

To illustrate how the conduct of a business centers upon its original records: Suppose you are a hardware manufacturer. A former customer requests quotations on cabinet drawer handles, "No. 2785, same as my last order." Your correspondent looks at your price list, sees that No. 2785 handles

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*regular* are \$1.45 per dozen, and writes quoting that price. The customer responds with an order. When his former order is looked up, it is found that he previously bought No. 2785 handles in *special brush* brass finish, at \$2.15 per dozen. He is written an apology and quoted the right price. He may buy the goods. But if he has had other quotations, the chances favor his buying elsewhere and becoming some other hardware manufacturer's customer.

Do you ask what filing has to do with this?

Proper and prompt access to all this customer's previous correspondence and enforced reference to it would have made your correspondent base his letter on *facts* and not on memory or guesswork. You would have been saved time, postage, temper and, probably, a customer.

Where filing and finding is slow and inaccurate, files will frequently contain as many complaints as orders; and the correspondence of that business will largely be dictated from memory, owing to the time and trouble required to get at previous cor-

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respondence. Where the file service is good, fewer complaints and quicker closing of sales is a noticeable feature of the business. Definiteness of information means much to your prospective customers and can come only from dictating from facts.

An illustration of the far reaching effects of slipshod filing is shown by the following incident. A New York advertising agency received in June a telegram from a Philadelphia client requesting one of its representatives to secure a certain Blue Book and arrive in Philadelphia that day. The request was complied with. In November they received another telegram suspiciously like the first. On telephoning Philadelphia they learned that the supposed sender of the wire knew nothing of it. Investigation showed that *failure to file* the long-hand draft of the telegram written in June—five months before—had permitted it to get into some active correspondence, causing it to be treated as alive and acted upon.

Thousands of such instances are occurring daily in all kinds of businesses and, despite the cost, confusion and trouble caused, it

seldom occurs to those concerned that inadequate methods of caring for original records create the confusion. Individuals are reprimanded for seeming personal negligence, when lack of order in the business itself is to blame.

Let it be said here that the one purpose for which this book is *not* intended, is to sell you any so-called *system* of filing. There is no system of filing in the generally accepted sense. There are filing *methods*, which, when properly applied to the various departments of a business and arranged in the proper combination the business demands, will give order to its conduct.

Because of the misuse of the word "system" in connection with office organization, we will avoid the term *filing system* and speak of all combinations of filing methods as the *filing plan*.

### What is a Filing Plan?

ORDER is heaven's first law and a first law of business. But there is no universal panacea for a disorganized organization any

more than there is a cure-all among medicines.

Ten years ago it was generally accepted as a fact that there was some ready-made scheme somewhere that would make any business self-recording, everything in fact but automatic. That businesses are essentially different and reflect the individualities of their builders and executives, was ignored. For several years, system for system's sake ran away with many organizations. Your ideas, your habits, the customs that have grown up in your business must absolutely dictate the plan of keeping track of its transactions. The filing plan can maintain order only to the extent that it fits the *business plan*.

Intelligent analysis of how your purchasing, manufacturing, sales and other departments coördinate reveals to the experienced filing man the different principles of filing required in your particular instance. And the way he combines these principles constitutes the filing plan.

The essentials of such a plan are: First, it must be a *finding* plan; it must not only



put papers out of sight: it must produce them—instantly. Second, it must be the simplest arrangement possible so that any new employe can quickly grasp its workings. Third, it must not require an efficiency expert to keep it going. Fourth, it must be capable of expanding with your business with the least possible alteration. Fifth and most important, it must not revolutionize your business.

It should adapt filing principles to existent conditions and not seek to alter operation of the business to accommodate any preconceived scheme. If abuses are revealed that have grown up through lack of coördination in your establishment, you will naturally want to reform them. That is in no sense revolution.

**WE ARE NOT SYSTEMIZERS, EFFICIENCY EXPERTS, OR BUSINESS ENGINEERS; NEITHER ARE WE EXPONENTS OF READY-MADE FILING PLANS. WHILE WE DEAL IN THE PHYSICAL MEANS FOR MAKING FILING PLANS PRACTICAL, OUR CHIEF COMMODITY**

IS OUR KNOWLEDGE OF WHERE  
TO USE AND HOW TO COMBINE  
THE PRINCIPLES OF FILING AND  
FINDING.

**The Three Filing Methods**

**And When to Use Them**

COMBINATIONS of filing principles are as countless as the combinations on a chess board, but there are, broadly speaking, three general methods: Alphabetical, or name filing; Geographical, town—or state and town—filing; Numerical, numbered correspondence filing.

One of the most fallacious ideas in connection with filing is that a superhuman effort should be made, often requiring great sacrifices of economy, time and space, to make one method fit every department and function of an office. Because you find it convenient to file your orders geographically is no indication that you must use the same method for filing correspondence. The way you file credit information need

not necessarily govern your filing of invoices.

The first question you should ask yourself in choosing a filing method is: How are my transactions carried on? The nature of the transaction has everything to do with the method of filing and keeping track of it. If you deal directly with a large number of individuals, having comparatively few transactions with them yearly, the mixed and transient nature of your *correspondence* would indicate alphabetical filing, even though orders, invoices, shipping, receipts, etc., required a different handling.

If you were dealing with public officials in the sale of an article to city governments, public school systems, etc., the same method would not do, because each sale would probably cover a considerable period; would involve letters from mayors, aldermen, school officials, boards of education, committees, etc., which would take too much time to collect together for reference, if filed individually. Payment of notes, introducing a *time* element, is another factor

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affecting filing in business of this kind. Town filing, with all the data collected in one folder under the name of the town in which the business is done, is much the simplest method under these circumstances.

Architects, contractors, construction engineers and other individuals doing more than a local business can often use town filing; even medical specialists receiving cases from various sections of the country sometimes find this the most practical method.

A railroad company having to file correspondence relating to accidents, involving claims from numerous sections, must file numerically, giving the folder containing all the data of the accident an arbitrary number and indexing the various correspondence alphabetically in a card index; so that, when a letter is received from any claimant, witness or physician, each can be quickly found by name in the card index, the folder containing all correspondence relative to the subject being located by its number on each individual's alphabetically filed card. These three general illustrations merely

serve to show why, in a general way, no one filing method will fit all cases. Having seen how the nature of the transaction governs filing, let us consider other possible factors.

A type founder or advertising agent doing business with newspapers, soon discovers that alphabetical filing is prevented by the sameness of newspaper names: *Times, Tribune, News, Courier, Chronicle*, etc., are too numerous for alphabetical filing. Filing by publishers' names involves too much dependence on memory. Here we file geographically, by towns, for a totally different reason than when dealing with city officials.

Bank filing presents similar difficulties, owing to similarity of bank names. Here, however, general correspondence is so easily separated from inter-bank correspondence, that the first can be filed alphabetically and the latter geographically.

Straight alphabetical filing can sometimes be used for the correspondence of both bank customers and correspondent banks.

The reader, from his own knowledge,

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will see other applications of the three principal methods from these illustrations. The variations are so numerous as to be appreciated only by those who have installed many thousand equipments. The tendency throughout the United States to-day is toward alphabetical filing wherever possible. Numerical filing—except for special purposes—is being abandoned, as placing too much dependence on memory, which results in the misnumbering and misfiling of folders and correspondence, and also because of its tendency to overcrowd folders and files.

Geographical filing is sometimes thought necessary for orders, reports, etc., as well as for reasons previously stated, though alphabetical filing—due to its more even distribution—is usually used in connection, for general correspondence.

The various attempts that have been made to combine numerical and alphabetical indexes in the same file will be touched upon under *indexing*. As the principal concern of a business is the filing of the documents passing between the parties to a

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transaction, we shall not consider here the filing of specifications, maps, plans or catalogues, which form a special class distinct from letters, orders, invoices, shipping receipts and the other documents common to most commercial businesses.

You will now see why the nature of your business and your manner of conducting it is the first consideration—or should be—of the person who undertakes to fit it with a filing plan.

IN THIS DAY OF SCIENTIFIC COST ACCOUNTING, IT IS BEING MORE AND MORE REALIZED THAT OVERHEAD IS NOT ALONE A CONSIDERATION OF THE SHOP AND FACTORY, BUT OF THE OFFICE AS WELL; AND THAT PROPER AND INTELLIGENT ATTENTION TO ORDERS THAT CANNOT BE FILLED IS AS IMPORTANT TO THE FUTURE OF A BUSINESS AS IS DELIVERY. MUCH LOSS OF GOOD WILL IN BUSINESS IS DUE TO LACK OF A FILING PLAN WHICH REALLY ACTS AS A ME-

**CHANICAL MEMORY TO THE ORGANIZATION AND IS IN FACT AN "INTELLIGENCE DEPARTMENT."**

### **The Principles of Indexing**

ANY explanation of indexing principles must be historical in its nature. Indexing, in its full relation to business problems, has been understood only since 1901, when Mr. W. A. Amberg completed his analysis of business names, which proved for the first time that the frequency with which names occur in business correspondence is subject to an unvarying rule.

In 1868, when railroads were few, there was hardly a business in the United States that could be called *national*. Most businesses were local and small and their filing methods primitive. The carbon copy was unknown, owing to the typewriter not yet being invented. The letter-book and copying-press were the only means of duplicating correspondence.

It was in this year that we presented the original self-indexing file.



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This file consisted of a flat drawer containing a single A to Z index. A special spring attachment clamped down the index and its contents. There was no cabinet, but only single drawers or horizontal flat boxes which increased in number with the growth of the business and were usually placed on shelving along the sides of an office.

For seven years various important businesses struggled along with this meagre equipment, which was the best anyone knew of, and until 1875 there was little improvement except in the mechanical and structural features of the drawers and devices for securing the index.

In 1875 we put forward the first Cabinet Letter File. This was a cabinet in which the single drawers previously described could be placed in order and more easily got at than when jumbled together on shelves.

As we still had no index but the A to Z alphabet, the limit of size for this cabinet was twenty-six drawers. The outside of each drawer was lettered with one of the letters of the alphabet, and names beginning

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with that letter were filed in a vowel index the drawer contained. Each letter of the alphabet was divided into five parts, viz., Aa-Ae-Ai-Ao-Au—Ba-Be-Bi-Bo-Bu, etc. The name Amberg was filed in the A drawer under Ae in the index.

With this scheme necessity for distribution became quickly evident. It was seemingly impossible to prevent names beginning with B, M, and S from filling the files so fast that those sections were now merely a disordered jumble, while the I, U, and V sections remained practically empty. In the A to Z index, the twenty-six letters of the alphabet did equally impartial duty. A, with its comparatively small quota of names, had as much space as S, which in practice was required to hold the letters of four times as many correspondents.

I-J and X-Y-Z had usually been combined in ledgers as well as in most alphabetical indexes, which proved lack of distribution to be an inherent feature of this type of indexing from the very first.

To further more even distribution, we advocated that letters be filed into the draw-

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ers by *surname*, and that they be filed into the index in the drawer by *given* name or by secondary firm name, the index used in the drawer being what we know today as the Plain Alphabet.

Robert Burns would therefore be filed in drawer *B*, under *R* in the A to Z index. Endicott Johnson & Co. would likewise be filed in drawer *E*, under *J* in the index, etc. This effort helped distribution a little over the old way of filing under surname in both drawer and index, but made it impossible to find correspondence if a given name or secondary firm name was forgotten.

Strange as it may seem now, this was considered a very great advance in filing when it was tried, for no one had yet dreamed of a scientific basis of indexing such as we now have.

Geographical filing, while unexcelled where specially required, could not be considered for very general correspondence. Filing alphabetically by states offered, in the division for each state, the same indexing problems to be met in filing nationally by alphabetical divisions.

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Only one proper solution remained, which was—to find out which individuals whose names began with certain characters of the alphabet, wrote the most business letters and the proportional value of each letter of the alphabet to the entire twenty-six.

One year, from 1875 to 1876, was spent in subdividing the alphabet on the basis of the names contained in the Chicago City Directory. This method was inadequate because too local, but was the first real start in the right direction, and our directory indexes, developed from this method, were used until 1880 by many of the important business houses of the country.

It may seem strange, even to the filing novice but slightly familiar with present alphabetical indexes, most of which are subdivided from figures which we arrived at, that we did not sooner arrive at the present method. It must be remembered, however, that we were doing a pioneer work without the help of any competitors' achievements to guide us, and had to eliminate all the schemes that would not work, as well as discover the true principles for ourselves.

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Our reward is the knowledge that all lasting improvements made and now used in filing are based on principles we originated.

The need of a national index to meet the needs of business which, through increased and quicker rail communication, the telegraph and such business forces as advertising, was hourly becoming more national, now led us to check the commercial directories.

In 1880, our indexes compiled from Bradstreet's lists in large cities, were marketed. They were a great improvement over anything the business man had previously known, and continued to be extensively used for twenty-four years.

By 1897 the increase of national business began to disclose that an index based only on the commercial names in large cities, was not comprehensive enough. Many small communities ranked high in manufacturing, had large correspondence, and were not provided for in our indexes.

Mr. W. A. Amberg now began the compilation and analysis of a list of 205,920 commercial names. It required seven years,

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or until 1904, before this work reached a point where the smaller sized divisions now in use could be made from the figures obtained, and it was two years more, or 1906, before our extensively divided indexes (up to 7200 divisions) could be produced.

From 1906 to now, a check has been continuously kept both on the changes occurring in commercial names and on the accuracy of distribution shown in the thousands of Amberg Indexes which are in use, and which we keep under as close supervision as our clients will permit, for our good as well as theirs.

In the following detailed account of Mr. W. A. Amberg's work and its results, figures are given which prove his efforts to have been as accurate as the law of averages and the limits of human perfection permit men to attain.

205,920 names were analyzed. Each was written on a separate slip, sorted alphabetically and tabulated, to show the number of times each name occurred under its letter of the alphabet. The beginning and the end of the completed list is shown below.

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Aab . . . . .	1	Aber . . . . .	1
Aagaard . . . . .	1	Abercrombi . . . . .	1
Aalholm . . . . .	2	Abercrombie . . . . .	2
Aaron . . . . .	13	Aberdeen . . . . .	7
Aarons . . . . .	3	Aberer . . . . .	1
Aaronson . . . . .	3	Aberfoyle . . . . .	1
Aarup . . . . .	1	Aberle . . . . .	1
Abadie . . . . .	3	Abernathy . . . . .	3
Abascal . . . . .	2	Abernethy . . . . .	1
Abbe . . . . .	6	Abert . . . . .	1
Abberley . . . . .	1	Abes . . . . .	1
Abbetmeier . . . . .	1	Abhan . . . . .	2
Abbeville . . . . .	2	Abietine . . . . .	1
Abbey . . . . .	7	Abilene . . . . .	3
Abbot . . . . .	13	Abingdon . . . . .	1
Abbott . . . . .	62	Abington . . . . .	2
A B C . . . . .	2	Abke . . . . .	1
Abdill . . . . .	3	Able . . . . .	2
A'Becket . . . . .	1	Ableiter . . . . .	1
Abeel . . . . .	2	Ablemont . . . . .	1
Abegg . . . . .	3	Ablett . . . . .	1
Abel . . . . .	26	Aborn . . . . .	4
Abele . . . . .	4	Aboussleman . . . . .	1
Abeles . . . . .	17	Abraham . . . . .	30
Abeling . . . . .	2	Abrahamer . . . . .	1
Abell . . . . .	3	Abrahams . . . . .	29
Abeln . . . . .	1	Abrahamsen . . . . .	1
Abels . . . . .	1	Abrahamson . . . . .	4
Abelson . . . . .	1	Abrahms . . . . .	1
Abenaqui . . . . .	1	Abram . . . . .	2
Abendpost . . . . .	1	Abramovics . . . . .	1
Abendroth . . . . .	7	Abramowich . . . . .	1
Abendschoen . . . . .	1	Abramowitz . . . . .	1
Abenheim . . . . .	2	Abrams . . . . .	21

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Abramski . . . . .	1	Ache . . . . .	1
Abramson . . . . .	3	Achelis . . . . .	1
Abrasive . . . . .	1	Achelpohl . . . . .	1
Abresch . . . . .	1	Achenbach . . . . .	1
Abson . . . . .	1	Achert . . . . .	1
Abstein . . . . .	1	etc., etc., ending with	
Abston . . . . .	1	Zwicker . . . . .	1
Abt . . . . .	6	Zwicky . . . . .	1
Abts . . . . .	1	Zwieg . . . . .	1
Abwender . . . . .	1	Zwierlein . . . . .	1
Acadia . . . . .	2	Zwietusch . . . . .	2
Ace . . . . .	1	Zwilchenbart . . . . .	2
Acer . . . . .	2	Zwilling . . . . .	3
Acetylene . . . . .	1	Zwissler . . . . .	2
Ach . . . . .	3	Zytowiecki . . . . .	1
Achard . . . . .	1	Grand Total, 205,920	

The number of names occurring in each letter of the alphabet is as follows:

A . . . . .	6,668	Names
B . . . . .	19,358	"
C . . . . .	13,676	"
D . . . . .	8,597	"
E . . . . .	4,722	"
F . . . . .	8,161	"
G . . . . .	9,678	"
H . . . . .	16,593	"
I . . . . .	1,177	"
J . . . . .	3,865	"



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K . . . . .	9,416	Names
L . . . . .	9,938	"
M . . . . .	18,430	"
N . . . . .	4,509	"
O . . . . .	3,067	"
P . . . . .	9,011	"
Q . . . . .	367	"
R . . . . .	10,359	"
S . . . . .	23,200	"
T . . . . .	5,933	"
U . . . . .	1,148	"
V . . . . .	2,298	"
W . . . . .	14,142	"
X . . . . .	11	"
Y . . . . .	765	"
Z . . . . .	831	"
Total, 205,920		"

Fourteen years' test in thousands of files of all sizes, proportioned in accordance with Mr. Amberg's figures, has proved them to be correct. The average of uneven distribution in Amberg indexing averages less than one-half of 1 per cent. In the largest business in the world, known wherever lamps are burned or automobiles used,

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the percentage of uneven distribution in Amberg files proved to be less than one-tenth of 1 per cent.

Given the proper ratio to work from, it will be readily seen that to produce index divisions of any size, is a simple matter. For example, the following table shows how many divisions each letter of the alphabet must receive to produce a well-balanced alphabetical list of 800 filing divisions:

A	.	.	.	.	.	.	25	Divisions
B	.	.	.	.	.	.	78	"
C	.	.	.	.	.	.	53	"
D	.	.	.	.	.	.	34	"
E	.	.	.	.	.	.	18	"
F	.	.	.	.	.	.	32	"
G	.	.	.	.	.	.	40	"
H	.	.	.	.	.	.	66	"
I	.	.	.	.	.	.	4	"
J	.	.	.	.	.	.	15	"
K	.	.	.	.	.	.	35	"
L	.	.	.	.	.	.	35	"
M	.	.	.	.	.	.	70	"
N	.	.	.	.	.	.	20	"

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O	.	.	.	.	.	.	13	Divisions		
P	.	.	.	.	.	.	35	"		
Q	.	.	.	.	.	.	2	"		
R	.	.	.	.	.	.	40	"		
S	.	.	.	.	.	.	90	"		
T	.	.	.	.	.	.	22	"		
U	.	.	.	.	.	.	5	"		
V	.	.	.	.	.	.	9	"		
W	.	.	.	.	.	.	53	"		
X	}						6	"		
Y										
Z		.	.	.	.	.				
							Total, <u>800</u>	"		

In explaining the problems that compelled us to solve the mysteries of alphabetical indexing, the reader will see that it was not a matter of choice, but of dealing with an exact science, and filing problems should be treated as such.

We do business with people or concerns having names. Names are spelled with letters of the alphabet. We learn the alphabet in its order, as our A-B-C's. If we give Arthur Abercrombie's correspondence a number, and file his *name* on an index

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card, we are safe only when we remember his name begins with "A"—our memory as to the number we gave him may fail us. If we file by states, we always start with Alabama and end with Wyoming. If we file by towns, we find that Akron, Albany, Atlanta and Auburn follow each other in alphabetical order. We solved the question of straight alphabetical name filing because we couldn't avoid it.

As usually the greatest amount of matter to be filed is correspondence, it should be given first consideration. Correspondence is not only from customers, but from prospects and from concerns from whom we may or do purchase, as well as from different branches or departments of our own business. Segregation of any class of correspondence from the whole as separate files, may keep letters from the credit man, sales manager, advertising manager or even the head of the business, if all are concerned with them at the same time.

It is becoming almost a universal practice to file all letters in the same file by surname or firm name only. The reason for

this is that modern indexing permits filing and finding with such facility that departmental files are not only unnecessary, but a detriment to speed. Unless the nature of your transactions prohibits it, you should file your correspondence alphabetically. Whether you file orders and letters together, will depend on whether you deal direct or use salesmen, whether your transactions are long term or short term, and whether you have sectionally divided sales territory or a few general travelers.

### **Practical Value of Proper Indexing**

THE word "index" means—that which points out. The ability of an index to point out the place to file and the place to find is governed by two things. First, it must present to the eye every combination of letters necessary to tell where to look for a proper or firm name or where to file it. Nothing should be left to the file clerk's judgment or imagination, if error is to be avoided. This means that the alphabet must be so divided in its relations to the actual names it





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will have to deal with in your business, that the element of choice of a filing or finding place is eliminated.

By looking at the illustration of the first forty indexing divisions of an 800-division file, you will see how nearly impossible it is to misfile and likewise misfind what already has been filed—where the file clerk has sufficient education to read a letter head. The person who would file Aaron, Abbey or Abel anywhere but under <sup>AA</sup>AB\* would be as likely to file them under Z; and you don't retain file clerks of that calibre—long.

You will note that some divisions have two letter indexes, some three and some four, and that wherever a corporate or proper name demands all or most of a division, the whole name appears in red; and that the preceding index tab shows a red star, meaning that the name following is excepted from that division. There is never any doubt as to what comes between the divisions. These letter combinations, being based on the actual ratio of frequency with



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which they occur in the correspondence of any business requiring a file of this size, provide for just those combinations that will have to be handled in that size business.

In case the concern buys from a Mr. Abel or Mr. Abeles, or he is their leading distributor, or a large customer, the volume of his correspondence entitles him to a special leader-guide, and possibly more than one division, in which his yearly correspondence is divided from January to June and July to December. This provision for the exceptional correspondent simplifies the file clerk's problem of being accurate and prompt, to an even greater degree than the straight file arrangement, which is simple enough. To sum up, the subdivisions of the alphabet must be so accurately applied to the probable names to be dealt with, that there is never any doubt as to their application in filing and finding.

The second feature of an index, which governs its ability to point out, is its physical construction. Whatever guides are used, must be so designed that they do not cut each other off from view, whatever

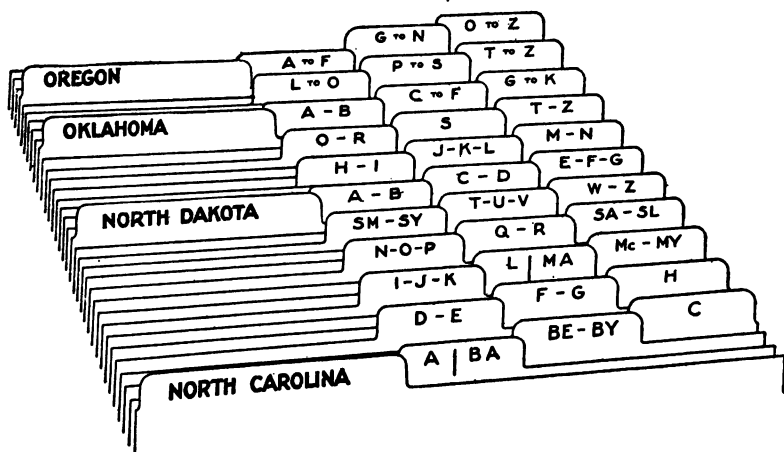
their arrangement. The printing on the tabs should be of such a size that it can be easily read from a distance. And all exceptions should be indicated by a difference in the size of the guide tabs or a change in color of the printing on the tab. As previously mentioned, we warn the eye before an exception is reached, by a red star on the black-printed tab, preceding all red tabs in our straight alphabetical equipment. The illustration (facing page 29) of a vertical drawer, with file installed, demonstrates the entire visibility of the index can be maintained. Despite the fact that the photo from which this illustration was made was taken almost on a level with the top of the drawer, every index tab is visible. To the file clerk standing up and looking slightly downward, every active combination of letters on every tab would be wholly visible, and he would never have to finger over several tabs to locate what was behind them.

It will be noticed that all the folders are out of sight well below the tops of the guides, and owing to the difference in height, cannot cut the guides off from view. The im-

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portance of this feature will be explained in a following chapter.

You have now seen how the proper division of names alphabetically produces an index which "points out," and how the proper physical construction of the index increases the speed and safety of its operation.



We will now consider the application of the alphabetical index to other methods of filing. The illustration above shows a simple form of what is wrongly called "geographical" filing. A moment's thought

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and study reveals the fact that this is really alphabetical filing in which the state name is made a factor which may confuse the file clerk.

Having a separate index for each state gives as many places to file a name under any alphabetical division as there are states in the file. Correspondence must be sorted by states before filing, and if an Illinois letter is sorted into the Iowa file, the file clerk must be alert to the correspondent's *state*, as well as his name, if he is not to file wrong. He must always keep two things in mind, instead of only one, as in filing by name only or by town only. Erroneous ideas which cause adherence to this form of filing are: First, that it is simpler than straight alphabetical equipment of equal size. This is true as regards some alphabetical systems in which the index divisions must be mentally figured out by the file clerk. It is not so with an index such as we have described, in which there is no choice of a place to file. It is also believed that state arrangement gives more filing divisions; sixteen drawers arranged by states, averaging 50 filing divis-

ions to a drawer, makes 800 filing divisions. An 800-division alphabetical set occupies exactly the same number of drawers.

Better distribution is also claimed for state arrangement. This cannot be true, if the same basis is used for providing for names in each state as that for providing for names a national arrangement or straight name file. Referring to the illustration: North Carolina has fifteen divisions; North Dakota, nine divisions; Oklahoma, six divisions; and Oregon, three divisions. In Table (page 25) we explained how, with exact figures to compute from, it was possible to make accurate index divisions of any size required. If state indexes are proportioned to care for a previously known volume of correspondence and a national index is proportioned to care for the *sum* of the correspondence from all states, there can be no difference in the distribution of the matter filed.

In a 100-division file A has three divisions; and in an 800-division file twenty-five divisions. The use of eight 100-division files will be seen to give A practically the

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same number of filing places as does one 800-division file. This rule holds good wherever the sum of the small divisions equals the larger division. Recollect, however, that this is so only when a scientifically accurate and thoroughly proven analysis of names is the basis of the indexing.

Any locality method of filing is more easily disordered than a more general one. Increased or decreased business in a locality due to booms, strikes, crop failures, changes of salesmen, etc., either tends to throw part of the file out of use or necessitates its enlargement. The ease with which state-and-alphabetical filing can be adjusted to changes is often cited in its favor. Straight alphabetical filing has the added virtue of never needing such adjustment, unless your business grows too large for its initial filing equipment. Desire to avoid the dangers of the form of subdivided alphabetical filing just explained, led us to study the problems of straight town filing with the same thoroughness with which we attacked straight alphabetical filing and indexing.

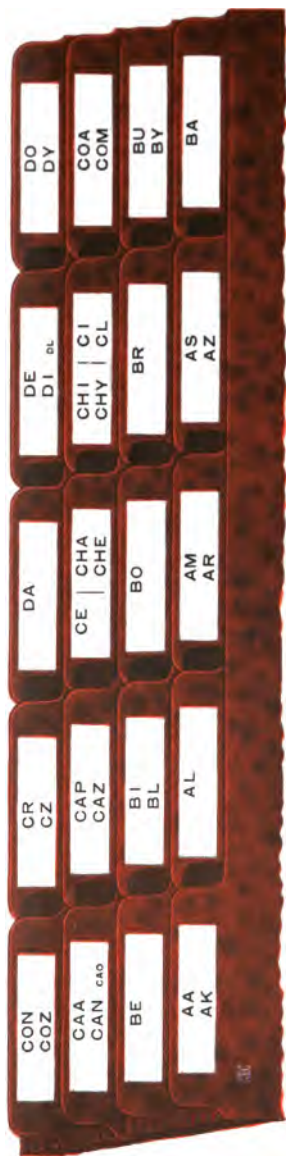
Previous to our analysis of town names,

the directory index was used for town filing in the same way it was used for name filing. This method, dealing as it did with many names that are never prominent in business, was a makeshift device, even for name filing. Applied to town filing, it did not fit at all. While the most prominent proper name is Smith, there are comparatively few towns of that name; while Clark, Davis, Johnson, Thompson, etc., are equally rare. The prefixes East, West, North and South, New, Fort, Mount and Spring, are frequent in town names. We found that of the 150,000 or more towns in the United States but 29,053 need provision in town indexing. By tabulating these by their alphabetical value, we were able to establish a basis for making accurate town indexes of any size from three to eight hundred or more divisions. Filing by this method is very similar to straight alphabetic filing, as the name of the town is the only thing to remember and there is only one guide under which a town correspondence can be intelligently filed.

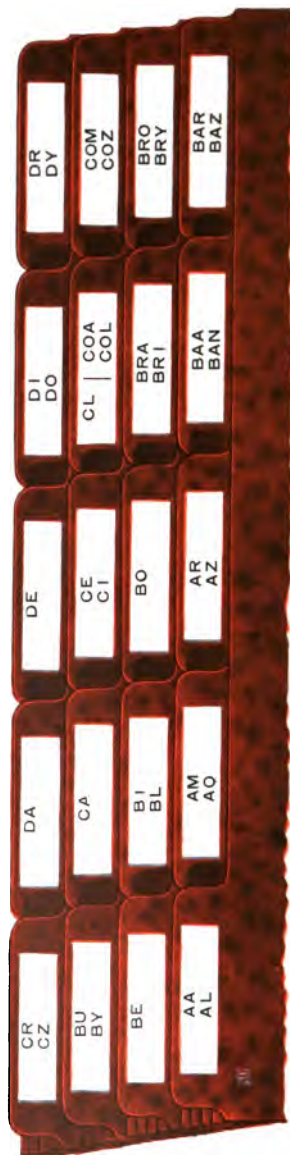
While the subdivision of the alphabet cannot be carried to the fine degree possible







GEOGRAPHICAL INDEX (FIRST 20 OUT OF 80 DIVISIONS TO ALPHABET)



NAME INDEX (FIRST 20 OUT OF 80 DIVISIONS TO ALPHABET)

NOTE DIFFERENCE BETWEEN GEOGRAPHICAL AND NAME DIVISIONS IN ALPHABETICAL SET OF THE SAME SIZE

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in name filing, the fewer alphabetical combinations used in towns productive of correspondence render it unnecessary. The first 20 divisions of an 80 division to the alphabet *Geographical* are shown by illustration on opposite page. For comparison the first 20 divisions of an 80 division to the alphabet *Name* are also shown. It will be noted that the divisions are not the same. Therefore, name divisions should not be used in a geographical plan, or *vice versa*, if equal distribution of the matter to be filed is to be obtained.

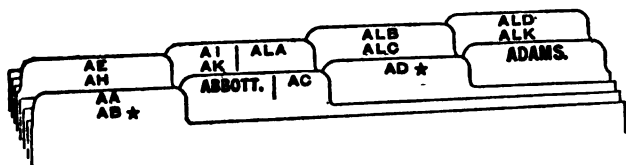
State and town filing is practically the same as state and alphabetical filing, except that each state is indexed by town instead of by business names. In filing orders or other office forms, it often seems necessary to adopt this method. Our experience has been that it can often be avoided without any sacrifice. The reason it should be avoided where possible is that it can offer from one to forty places where the same letter may be filed exclusively. The file clerk sorts by states and files by towns. If he always sorts correctly, or if he always

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remembers both town and state while filing, there is no chance of misfiling.

Card indexes for numerical filing are made on the same principle as our alphabetical guide sets for straight alphabetical filing. Comparison of the card index illustrated with the 800-division index on page 29 will show that the subdivision of the



alphabet is identical, except that the card index is only four tabs wide.

While the numerical method is rapidly giving way to alphabetical filing, except for special kinds of business, like insurance, a few concerns adhere to it because of the belief that its card-index feature facilitates cross reference. Examination of thousands of files indicates that the need for cross-indexing is largely imaginary and that when kept up properly it is not utilized enough to offset its cost of maintenance and

retarding of file work. It is not a bad thing in businesses which are forced to file numerically and have a surplus of office help, though a subject index can be used with any kind of a filing method.

There are several variations of filing we have not touched upon, which apply to special cases, but are not usual enough to demand mention here.

### **Housing the File Equipment**

AFTER having had the meaning of filing and indexing explained and their importance to the proper conduct of business made clear in the foregoing chapters, the reader will understand our attitude when we say the properly chosen type of file, properly indexed, is of more value if kept in a soap box, than is a carelessly chosen, badly indexed file in the costliest cabinet made. Many prospective purchasers in our various sales rooms are carried away by the ease with which a drawer slides, or by the exterior finish of our furniture. Our hardest problem is to impress them with the small im-

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portance of these features as an aid to business.

Select your file furniture for the way it will accommodate your files. In many instances the furniture does not fit the file. The drawers are not high enough to permit of an index that shows well above the folders. Folders and correspondence are found riding over the index, cutting it off from view and defeating its purpose. Whether you desire furniture of steel, mahogany or oak, do not let mere externals blind you to the real object of your investment. That the best is usually the cheapest in the end, is an axiom. However, there are times when it seems advisable to economize on appearances and to secure efficiency at the smallest cost. Therefore consider the performance demanded of your files as the sole basis of their value as regards every expenditure.

The finish of your office woodwork, your desks and present furniture may form your desires. You may expect to outgrow your present quarters in a year or two, or may departmentize your business or branch out

into new fields which will alter your methods. Try to decide upon the type of equipment you will want to grow with and do not choose what you will want later to discard, unless economy or a compelling temporary need makes it imperative.

As the oldest makers of filing cabinets, we insist upon the highest standards in our furniture and make nothing but the best in every grade we supply. What we do not do, is sell inadequate filing equipment on the strength of our skill as cabinet makers. Neither are we engaged in the brokerage or conversion of wood pulp in the form of folders or indexes.

As explained in this book, our business is, and has been for fifty years, the *combining* of the various methods of filing and indexing so that they *fit* the business of each of our clients.

**A** SPECIMEN alphabetical equipment in a vertical file drawer, showing the arrangement of guides and folders, is illustrated opposite. The alphabetical guides have the indexed tabs in the three positions at the right. The folders, being lower than the guides, never rise and obscure the index.

Back of each alphabetical guide is a miscellaneous folder indexed to correspond with the guide as shown at BO. These folders accommodate the miscellaneous correspondence of those who write only occasionally.

When it becomes desirable to individualize the correspondence with any one person or concern, it is removed from the miscellaneous folder and filed in a typewritten individual folder like John L. Bobo & Co. and the Born Steel Range Co.

As certain correspondence grows more important, it may require two or more individual folders for the year. A leader guide with dated folders like those of Butler Brothers may be inserted then. Dated folders and guides are also furnished for filing correspondence in periods of four months (see Dennison Mfg. Co.), three months, two months, one month, fifteen days, and so on down to a separate folder for each day's correspondence, if necessary.

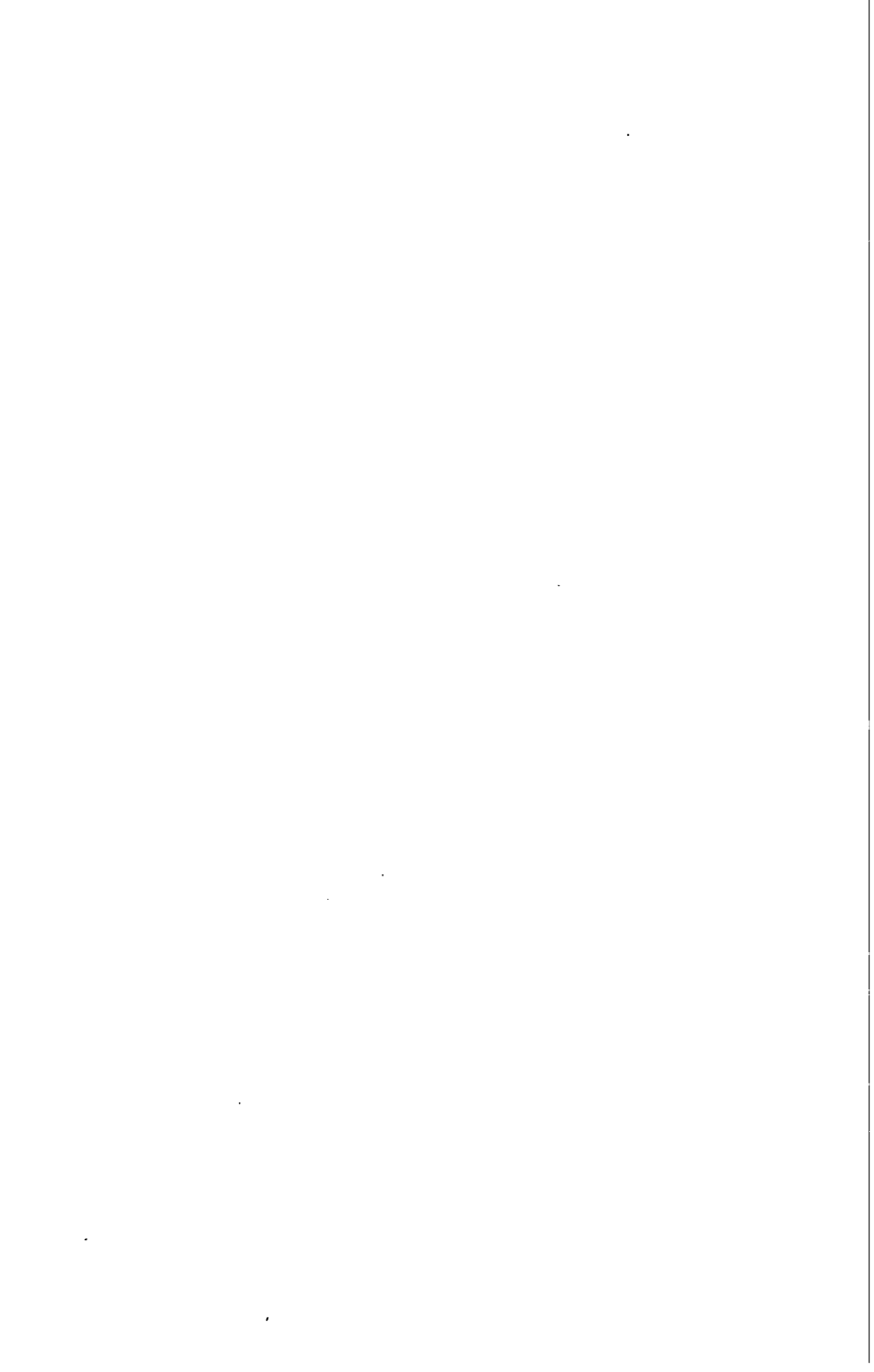
It is easy to see from this brief description how simple a matter it becomes, not only to readily file and find original records, but to expand and take in an AMBERG filing plan to make it fit the peculiar requirements of any individual business.







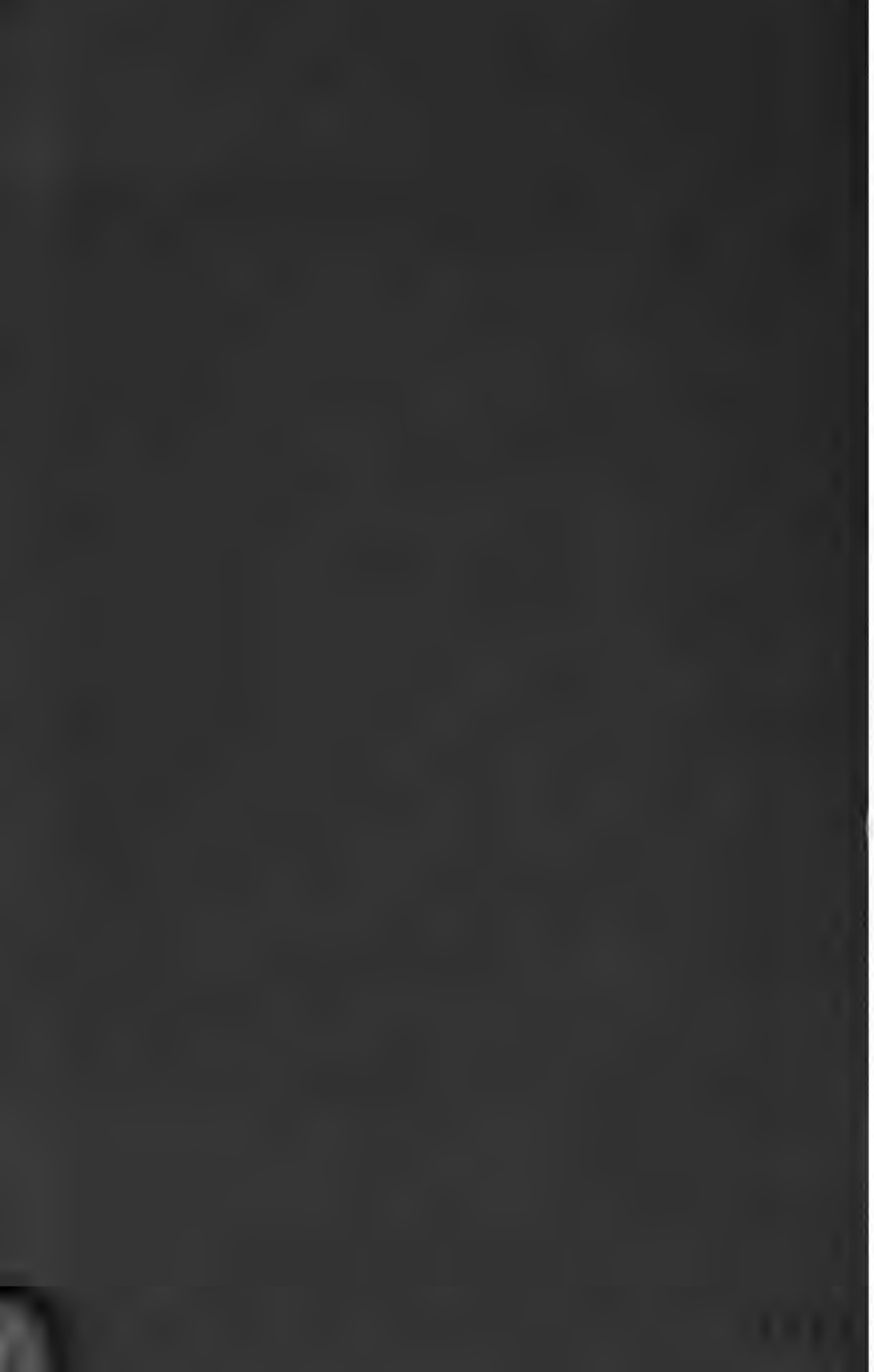












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